

# Learning Solutions Case Study: IRS Link & Learn Taxes

## Key Features

- Comprehensive online training in tax law and interview skills
- Interactive training with case studies, scenarios, sample interviews with audio, quizzes
- Instructional support for blended learning environment including lesson plans and presentations
- Companion 400-page print training guide
- Online assessment and certification for eight levels of expertise
- Annual evaluation and response to user surveys



## Training and Certification for Volunteer Tax Preparers

### *Convenient, Cost-effective Training Needed*

Volunteer Income Tax Assistance (VITA) and Tax Counseling for the Elderly (TCE) are IRS programs that provide free tax assistance to more than three million low-income and senior taxpayers. The IRS trained its VITA/TCE volunteers in three- to five-day classroom sessions. This presented challenges for volunteers because of the time commitment, lack of class availability, and travel required for the training. The IRS decided to explore the benefits of web-based training for its volunteers.

### *From Paper to Pixels*

Epsilon's Learning Solutions team developed Link & Learn Taxes for the IRS, an 80-hour web-based training program comprising over 4,000 pages of tax law narrative, examples, case studies, interview simulations, audio, and comprehensive exercises. Instructional support in the form of lesson plans, presentations, and a printed training guide are available for blended learning environments.

Link & Learn Taxes trains via five volunteer certification paths: Standards of Conduct, Basic, Advanced, Military and International. Additional training covers Puerto Rico, Foreign Student, Cancellation of Debt, and Health Savings Accounts. Experienced volunteers can catch up on new tax laws with a Returning Student course. Certification courses are also available in Spanish and all courseware is Section 508 compliant.

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## Applying Knowledge, Practicing Skills, Accessing Resources

The ability to accurately complete tax returns is essential for VITA/TCE volunteers. Link & Learn Taxes supports this mission with:

- Comprehensive training in tax law and taxpayer interview skills
- Realistic case studies and taxpayer interviews with audio
- Topic Activities that help volunteers apply what they've learned
- Check Your Knowledge quizzes on each topic

- A Training Toolkit for easy access to a range of resources including lessons, job aids, audio and video media, tutorials, assessments, and a practice lab
- Practice tests designed to measure mastery of course objectives
- Links to tax forms and publications

## Blended Learning and Instructor-led Training Support

Impressed with the instructional excellence of Link & Learn Taxes, the IRS asked the Learning Solutions team to develop printed student and instructor guides and additional instructor support for classroom training environments. The VITA/TCE training materials include:

- 35 microsite web pages specifically designed for instructors
- 35 interactive lesson plans and presentations with speaker notes
- Links to informative YouTube videos, podcasts, and tax software training.
- Tips, cautions, examples, and sample interviews to reinforce the narrative
- Exercises that help volunteers confirm their understanding of the content
- An index for quick reference to vital information

## Ongoing Success

Link & Learn Taxes has been on the IRS website ([www.irs.gov](http://www.irs.gov)) and CD-ROM since 2004, and is available to volunteers and the general public. During peak periods, more than 300,000 people visit Link & Learn Taxes; over 20 million pages have been viewed. There have been over 900,000 certifications using the online test and more volunteers are certified every year. Epsilon continually reviews user evaluations and client feedback for ways to improve the learning experience at Link & Learn Taxes.

The screenshot shows the Link & Learn Taxes website interface. At the top, there's a navigation bar with 'Home', 'Certification Paths', 'Puerto Rico', and 'Foreign Student'. Below that, a 'PATH:' section shows 'Student' and 'Teacher' tabs. A 'WELCOME: to the Advanced Course' banner is visible. The main content area is titled 'Earned Income Credit (EIC)' and includes a 'training toolkit' with icons for Skills Workout, Certification Warm Up, Media Videos & Audio, TaxWise Tutorial, Job Aids, and Practice Lab. There's also a 'skill check' section with a multiple-choice question about EIC qualifications.

The screenshot shows a question from the IRS website. The question is titled 'Skills Warm Up: Qualifying Widow(er)' and asks for the correct filing status for a widow in 2015. The options are: Qualifying Widow(er) With Dependent Child, Either Married Filing Jointly or Married Filing Separately, Head of Household, and Single. The correct answer is 'Qualifying Widow(er) With Dependent Child'. The interface includes a 'Main Menu', 'Print', 'Help', 'Glossary', and 'References' options.